

PTO Manager End of Year Procedures

Year End Database Clean-up Procedures

There are several clean up tasks that should be performed by the software coordinator at the end of a school year to prepare the database for the next year. These tasks can be accomplished with the Mass Update feature in PTO Manager.

- Click SET-UP
- Click USERS
- Click MASS UPDATE

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Mass Update
You can search for volunteers using any of the fields below. Simply enter your criteria and click on the 'Search' button.
To show all volunteers - leave criteria blank and click on the 'Search' button.

To show all volunteers, leave following criteria blank and click on the "Search" button.

Enter Search Criteria:

First Name: Last Name: Grade: Teacher:

Access Level: Students With Only This Grade:

Custom Field #1:

☐ Include Inactive Volunteers

Your search results appear below. Search

Volunteer Name	Email	User Type	Last Logged In Dtime	Select All
Blek Aaron	duclator@comcast.net	Volunteer	3 Nov 2008 10 22 PM	<input type="checkbox"/>
Blek Carl	carblek@comcast.net	Volunteer	26 Sep 2009 9 09 PM	<input type="checkbox"/>
Blek Ethan	et3.14@comcast.net	Volunteer	None	<input type="checkbox"/>
Blek Traci	tralebek@comcast.net	Software Coordinator Volunteer Administrator	5 May 2012 9 23 PM	<input type="checkbox"/>

1 2 3

Make Pending Make Inactive Delete Clear Class Assignments

Clear Interests Clear Availability Clear Custom3 Cancel

1 Graduating Family Clean Up

Select the highest grade listed under "Students with Only this Grade" to generate a list of families that only have a student in your school's highest grade. These folks are likely to be leaving your school. You may want to send an email to this list to confirm that everyone will be leaving the school. If they will be moving on, you should make the entire list inactive.

- Click SELECT ALL
- Click the "Make Inactive" button at the bottom of the screen. You will be prompted for the date to make "Inactive." (Please note: you are not DELETING these volunteers.)


2**Clearing Volunteer Interests**

You can easily clear volunteers' interests and availability so that volunteers will be able to select new interests at the start of the next school year. From the Mass Update screen, hit Search to pull a list of all volunteers. Check the "Select All" box to select the entire list of volunteers or select the volunteers you wish to update. Then hit the "Clear Interests" button or "Clear availability" button to clear the Interests and Availability from the volunteer records.

3**Clearing Class Assignments**

Students generally change grades/teachers every year so you can clear the current grade/teacher assignment for the students at the end of each year. Note: You may want to print class lists for historical purposes before you clear the class assignments. From the Mass Update screen, hit Search (with no criteria entered) to pull a list of all volunteers, click "Select All" and then simply hit the "Clear Class Assignments" button.

Review & Update Permissions




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SET-UP: User Permissions
Give appropriate permissions to your volunteers.

Volunteer Name	Software Coordinator	Volunteer Permissions
Bilek, Traci VIPS	<input checked="" type="checkbox"/>	Volunteer Chair
Butscher, Julie PTO President	<input checked="" type="checkbox"/>	Volunteer Chair
Martinez, Stephanie Office Secretary	<input checked="" type="checkbox"/>	Volunteer Chair
Trehan, Sujata VIPS	<input checked="" type="checkbox"/>	Volunteer Chair

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Software Coordinator Change



If you do nothing else at the end of the year, **DO THIS!** Only a current software coordinator can change the software coordinator's permission level. One or more of your board members should have software coordinator permissions in the software.

- Click **SET-UP**
- Click **USERS**
- Click **USER PERMISSIONS**

Check the Software Coordinator box next to users who should have software coordinator permissions. De-select the software coordinator box from users to remove the software coordinator permissions for that individual. Then click the "Save" button.

Permission Changes

New PTO Officers are generally voted in at the end of a school year and start serving their term at the start of the next year. There are certain software permissions that should be updated when your officers change. It's helpful to review that all permissions are correct before you start setting up for the next year. There are **TWO** different places to change permissions for volunteers: on the screen above through SET-UP -OR- on the screen below which can be found when you

- Click **VOLUNTEERS**
- Click **ADMINISTRATION**
- Click **PERMISSIONS**



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VolunteersEventsReportsAdministration



ADMINISTRATION: Permissions
The chart below shows your volunteers and the permission level they have been assigned. You can use this page to change your volunteers permission level.
What do the different permission levels mean? There are different levels of access to your site. The permission levels determine what the volunteer can and cannot view and edit on the site. For a full description refer to the "Quick Start Guide" manual (click on Help above for the manual).
Can't see a volunteer? If you've entered a volunteer and can't see them in this list it's likely they are waiting to be approved. You must approve all volunteers before they can do anything on the site. To approve volunteers click on the Volunteers link in the light blue bar above.

Volunteer Name	Administrator	Chair	Volunteer	Guest	Decline

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Update Bounced E-mail Address



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SCHOOL MANAGEMENT : Edit School

Please update/edit the fields below.

Domain Prefix: this is the first part of the web address your volunteers will use to access your site. For example: www.georgewashington.ptomanager.com "georgewashington" is the domain prefix. It's a good idea to select something that will be easy for your volunteers to remember.

Assignment Mode:
Admin Only: only administrators can enter volunteer hours
Self With Approval: volunteers can enter hours but they must be approved by administrators
Self Without Approval: volunteers can enter their own hours and no approvals are necessary

Open To Volunteers:
Open: volunteers can access your site
Closed: your site is active but volunteers cannot log in. This setting is helpful while you're setting the system up and getting it ready for your volunteers. Once you are ready change this setting to 'Open'.

School Information

* School Name : <input type="text" value="HIGHLAND ELEMENT"/>	* Address : <input type="text" value="711 E Euclid Ave"/>
* Domain Prefix : <input type="text" value="HighlandElementary"/>	* City : <input type="text" value="Littleton"/>
* Assignment Mode : <input type="text" value="Self without Approv"/>	* State : <input type="text" value="Colorado"/>
* Open To Volunteers : <input type="text" value="Open"/>	* Zip Code : <input type="text" value="80121"/> - <input type="text" value="2312"/>
Custom Field #1 : <input type="text"/>	Home Phone : <input type="text" value="(303) 347-4525"/>
Custom Field #2 : <input type="text"/>	Fax : <input type="text"/>
Custom Field #3 : <input type="text"/>	* Address for Bounced Emails : <input type="text" value="thebillek5@gmail.com"/>
	<input checked="" type="checkbox"/> School Sign In Active

Event Year Rollover

Administrative Dashboard
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Go to the [Content Manager](#)

Edit Mode:
☐ On
☒ Off


When PTO Manager is used to send out mass emails to your volunteer group, email bounces are sent to a designated address that is stored in the software. The software coordinator can change the "Address for Bounced E-mails" that is stored in PTO Manager if the responsibility is changing hands due to a board member or volunteer coordinator position change.

- Click SET-UP
- Click SCHOOL

Change the "Address for Bounced E-mails" to the new address.

- Click the "Save" button. There are several reasons why an email might bounce (bad email addresses, out-of-office replies, or Spam filters are just a few). The person who receives the bounced emails for your group can check to see what the issue might be and resolve it.

Year-to-Year Event Copy




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SCHOOL MANAGEMENT: Event Year Rollover
Use the "From School Year" search criteria below to generate the list of events you would like to copy to the school year specified by the "To School Year" field.

Enter Fields to Match:

* From School Year :
Aug 2011 - Jul 201

* To School Year :
Aug 2012 - Jul 201

* Indicates a required field
Your search results appear below. To sort click on the headings.


Search

Event	Event Leader	Location	Event Details	Select All
Streets of Southalenn			Tue, Aug 16: 10:00 AM to 11:00 AM	<input type="checkbox"/>
Wall of Fame		Main Office Hallway	Tue, May 22: 9:00 AM to 12:00 PM	<input type="checkbox"/>
HAC (Accountability Committee)		Library	Fri, May 25: 4:00 PM to 6:00 PM	<input type="checkbox"/>
Classroom-Apr/May			Wed, May 30	<input type="checkbox"/>
Garden			Wed, May 30	<input type="checkbox"/>
Library-Apr/May			Wed, May 30	<input type="checkbox"/>
Family Restaurant Nights		Various Local Restaurants	Thu, May 31	<input type="checkbox"/>

Confirm Event Rollover


Cancel

Event Year Rollover

 Save list to my computer

Administrative Dashboard
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 Edit Mode:
☐ On
☒ Off

This needs to be done before the end of year rollover on July 31. It's not essential, but it sure does save a lot of time!

- Click SET-UP
- Click SCHOOL
- Click EVENT YEAR ROLLOVER

When you click on SEARCH you will get a list of all your events from the current year.

. Select the events you want to copy for next year.

. Click CONFIRM EVENT ROLLOVER.

After the rollover, make sure to verify that everything is as you would like it to be.